



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, May 21st 2023





Market Watch

Sunday, May 21, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,341.82	-0.02	3.44	0.30	7.10	8.24	10,900 SAR	1.94	18.05
Qatar (QE Index)	10,651.45	0.07	5.56	4.62	4.30	-0.28	569 QAR	1.39	11.37
Dubai (DFMGI)	3,544.53	-0.31	1.64	-0.01	4.05	6.25	508 AED	1.27	13.90
Abu Dhabi (ADI)	9,478.69	-0.32	-0.83	-3.17	0.51	-7.17	1,435 AED	1.80	20.80
Bahrain (BAX)	1,947.81	0.24	3.52	2.28	3.24	2.77	20 BHD	1.63	17.65
MUSCAT SE INDEX	4,713.92	0.37	-2.02	-0.09	-3.07	-2.95	5 OMR	1.00	13.25
SP GCC Comp LMC	179.82	-0.14	1.19	-1.00	3.54	0.58			
SP UAE PRICE INDEX	131.44	-0.45	-0.74	-4.40	2.71	-4.41			

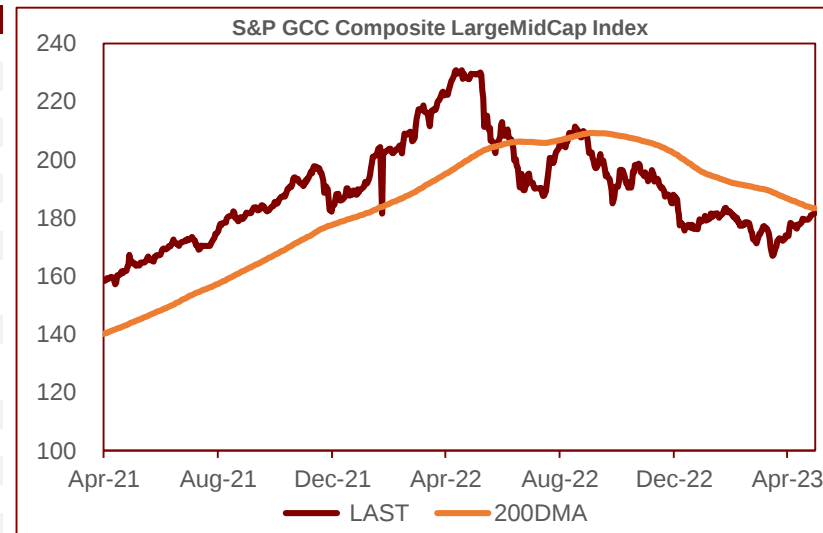
Developed Markets

MSCI World Index	2,842.76	0.09	0.48	0.24	1.84	9.22			
U.S. (S&P 500)	4,191.98	-0.14	1.10	0.54	2.01	9.18			
U.K. (FTSE 100)	7,756.87	0.19	-1.10	-1.44	1.64	4.09			
Japan (Topix)	2,161.69	0.18	7.66	5.06	7.90	14.27			

Emerging Markets

MSCI EM Index	977.24	-0.09	-1.98	0.02	-1.32	2.18			
China (SSE Composite)	3,283.54	-0.42	-1.05	-1.20	0.33	6.29			
India (Sensex)	61,729.68	0.48	2.15	1.01	4.64	1.46			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,819.46	0.28	-2.44	-4.52	-3.28	-6.48	44.14 KWD	1.65	19.13
Kuwait Premier Index	7,533.16	0.45	-2.90	-4.79	-3.69	-7.18	34.38 KWD	1.60	19.20
Kuwait Main Index	5,420.13	-0.46	-0.37	-3.32	-1.47	-3.16	9.76 KWD	1.80	18.88
NIC 50	8,864.77	0.00	-2.91	-4.80	-3.70	-2.41	28.60 KWD	1.58	18.20
Kuwait Sector									
Banking	1,670.14	0.33	-3.20	-4.90	-4.72	-6.90	28.14 KWD	1.22	20.20
Telecom	1,085.82	0.14	-4.42	-7.56	-4.10	-8.10	3.33 KWD	1.32	8.56
Industrials	974.98	0.73	-0.26	-3.04	-1.21	-9.63	3.43 KWD	0.79	19.88
Financial services	1,166.30	-0.65	-3.73	-5.21	-2.48	-7.23	3.37 KWD	0.69	19.74
Real estate	1,097.77	0.94	-1.80	-4.07	1.63	-9.18	2.38 KWD	0.52	19.79
Basic materials	876.51	1.01	4.70	-1.74	2.26	1.32	0.78 KWD	1.29	4.46
Health care	458.82	0.00	-0.78	0.40	0.73	-0.66	0.23 KWD	0.98	6.83
Consumer services	527.77	1.47	17.62	15.51	18.53	9.96	0.73 KWD	0.81	13.21
Insurance	2,137.87	-0.39	12.73	1.14	11.93	37.85	0.88 KWD	0.78	8.71
Consumer Disc	1,475.09	-0.09	3.24	1.22	0.90	-0.79	0.16 KWD	0.98	0.00
Energy	991.18	-0.61	-0.70	1.26	-0.67	-12.94	0.21 KWD	0.54	4.37
Technology	581.27	-0.13	-6.77	-0.13	-8.58	-16.51	0.01 KWD	0.72	0.00
Utilities	484.21	0.00	4.54	5.14	3.95	-2.13	0.20 KWD	1.85	15.07



What Move the GCC markets

Oil Prices

Oil prices reversed course to fall on Friday after U.S. House Republicans and President Joe Biden's administration paused talks about raising the government's debt ceiling, threatening a default that could cut energy demand. Brent futures settled 28 cents, or 0.8%, lower at \$75.58 a barrel.

Kuwait Market

The market closed up today by + 0.28% at 6,819.46 value traded 53.7 million KD, Premier market value traded reached 45.2 million KD up by + 0.45% at 7,533.16.

KSA Market

The market closed down today by - 0.02% at 11,341.82



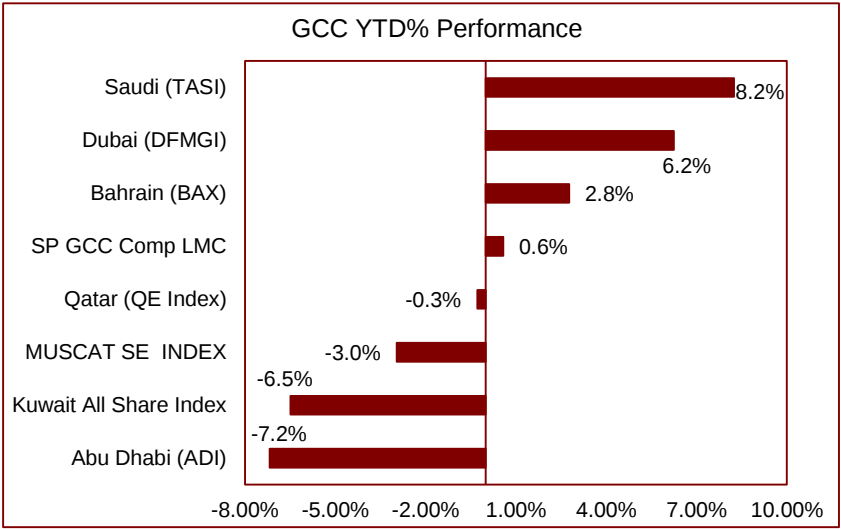
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.930	-0.32	-3.43	-7.37	-7.53	-9.42	7.37 KWD	1.87	27.00
KFH	0.722	0.84	-2.43	-2.56	-3.85	-3.50	10.66 KWD	1.84	32.00
Zain	0.516	0.00	-6.18	-8.35	-4.44	-8.35	2.23 KWD	1.74	11.00
BOUBYAN BANK	0.590	1.37	-6.35	-10.74	-2.74	-21.63	2.34 KWD	2.63	34.00
Agility	0.620	1.31	3.68	0.65	-0.16	-13.89	1.66 KWD	0.87	22.35
Saudi Arabia									
ARAMCO	32.40	0.00	8.49	-1.82	10.34	11.03	7,840.80 SAR	5.25	13.95
SABIC	91.00	-0.22	-0.22	-2.05	0.78	1.79	273.00 SAR	1.46	35.00
STC	44.25	0.00	4.12	-0.34	10.49	20.90	221.25 SAR	2.95	18.05
AL-RAJHI BANK	74.70	-0.27	-1.19	-2.86	1.63	-0.66	298.80 SAR	3.01	17.46
NCB	37.85	-0.39	1.94	2.66	10.61	0.43	227.10 SAR	1.32	12.26
United Arab Emirates									
ETISALAT.AD	22.02	0.00	-6.06	-8.25	-0.18	-3.67	206.60 AED	5.10	21.10
FAB.AD	13.62	-1.87	3.50	-3.95	5.75	-20.35	150.47 AED	1.34	12.83
EMIRATES NBD	13.85	-1.07	6.54	-1.77	5.32	6.54	87.49 AED	0.91	5.23
DB ISLAMIC BK	5.36	0.37	0.94	-3.60	2.49	-5.96	38.81 AED	0.96	7.45
EMAAR PROPERT	5.95	-0.67	-0.34	0.34	6.25	1.54	52.59 AED	0.74	6.27
Qatar									
QNB	16.98	0.18	9.55	10.98	5.66	-5.67	156.83 QAR	1.54	11.21
INDUSTRIES QAT	13.07	-0.15	0.23	0.93	0.54	2.03	79.07 QAR	2.16	10.87
QA ISLAMIC BK	18.50	-0.22	4.11	3.41	4.05	-0.32	43.71 QAR	1.64	11.30
MASRAF AL RAYA	2.72	0.18	1.04	4.01	-7.88	-14.16	25.31 QAR	1.07	20.70
MESAIEED PETRO	2.09	1.65	6.25	6.31	8.85	-1.74	26.26 QAR	1.61	16.48
OMAN									
BANK MUSCAT	0.267	-0.74	-2.91	-2.20	-2.91	-2.91	2.01 OMR	0.93	8.33
OMANTEL	0.988	11.26	-2.66	-1.20	-10.18	7.39	0.74 OMR	1.22	7.69
BANK DHOFAR	0.176	0.00	10.00	13.55	10.00	0.57	0.53 QAR	0.74	14.93
NAT BANK OF OMAN	0.287	2.50	1.06	4.36	7.09	-0.69	0.47 QAR	0.72	12.71
OMINVEST	0.382	0.00	-8.17	-5.91	-22.98	-9.05	0.26 QAR	0.71	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
3-May 23	24.86%	16.06%	0.06%	1.37%	0.44%	4.63%	17.67%	14.19%	6.09%	5.07%
10-May 23	24.78%	16.01%	0.06%	1.35%	0.44%	4.61%	17.66%	14.12%	6.06%	4.98%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.28 %The leading sector best performance indices today are Consumer services 1.47 % Basic materials 1.01 % Real estate 0.94 % respectively

KSA

Saudi Armco has a flat performance today, SABIC has a negative performance today by - 0.22 %, STC has a flat performance today 0 %, Al Rajhi Bank has a negative performance today by -0.27 %

U.A.E

ETISALAT .AD has a flat performance today 0 %, FAB.AD have negative performance today by -1.87 %



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